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ABSTRACT

Originally written for use by Queens College Library (New York) Technical Services staff members, this manual is designed to increase efficiency and accuracy through the programming of function keys to execute commonly used NOTIS acquisitions and cataloging functions. The manual provides suggestions for expediting NOTIS operations based on IBM InfoWindow 3472 display terminals. It is noted that applications to other functions such as serials control and circulation can be developed easily based on the basic procedures provided here. The report is divided into four chapters: (1) suggestions and recommendations for the implementation of defined function keys; (2) orientation to important keys for programming and using function keys; (3) basic instructions for programming and using function keys; and (4) examples of programming complex multiple screen sequences based upon Queens College workflow and procedures. (DB)

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A GUIDE TO PROGRAMMING FUNCTION KEYS FOR THE NOTIS SYSTEM

Preliminary Edition

BY

BELINDA CHIANG

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PREFACE

This guide was originally written for use by Queens College Library Technical Services staff members. We have found that increased efficiency and accuracy can be achieved by programming function keys to execute commonly used NOTIS acquisitions and cataloging functions. This guide has been distributed to colleagues in the CUNY libraries upon request.

Our library currently uses the IBM InfoWindow™ 3472 display stations for all NOTIS operations. The basic directions for programming and using function keys can be found in IBM InfoWindow™ 3472 User Guide[1] Libraries using other types of terminals should refer to appropriate manuals for function key programming procedures. This guide provides suggestions for expediting basic NOTIS cataloging and acquisitions operations according to local workflow and practices. Applications to other functions such as serials control, circulation, etc. can be easily developed based upon the basic procedures given in this guide.

This guide consists of four chapters. Chapter One provides suggestions and recommendations for the implementation of defined function keys. Chapter Two orients the reader with important keys for programming and using function keys. Chapter Three gives basic instructions for programming and using the function keys. Chapter Four consists of examples of programming complex multiple screen sequences based upon our local workflow and procedures. Modifications may be needed according to your local workflow.

I must express my deep appreciation to David Samuels who provided guidance regarding the programming and use of the function keys of the IBM 3472 display stations and Ben Chitty for his valuable suggestions. Finally, I would like to thank the staff members in Cataloging and Acquisitions Departments of Queens College Library whose enthusiasm, cooperation and inquisitiveness have made the writing of this guide a pleasure instead of a task.

Belinda Chiang

Belinda Chiang

Queens College Library
New York, 1991

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[1] *IBM InfoWindow™ 3472 User Guide. New York: International Business Machines Corporation*, 1991.

CHAPTER ONE

RECOMMENDATIONS AND SUGGESTIONS

1. Prior to programming the function keys, the supervisor/manager must make sure that the staff members are well trained and familiar with the NOTIS functions pertinent to their duties. They should be able to perform such functions independently when they must exit the program due to inputting error or system problems.

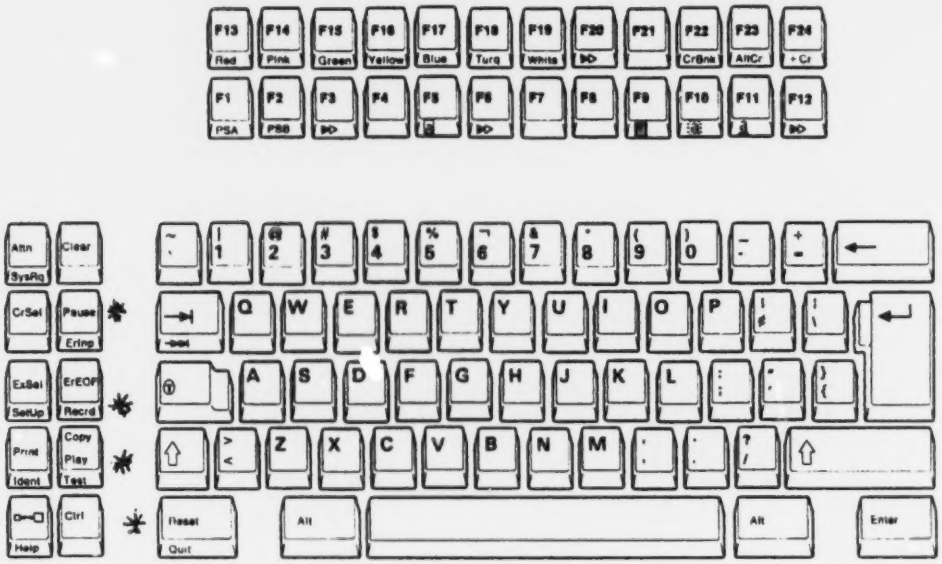
2. It is recommended that function keys be defined and experimented in training mode so that no accidents will happen to your real database. Once you have perfected and stored the definition on a function key, you may exit the training mode and use the defined function key immediately in your real database.

3. To avoid confusion and maintain consistency, all terminals in one department should have the same definitions on the same function keys. Staff members with NOTIS terminals at their desks may use the last few function keys to record any keystrokes deemed necessary. These personalized function keys should also be promptly recorded by the individual for quick reference.

4. A list of definitions of all function keys and the procedures for their execution should be available to departmental staff members.

5. The additions and changes of the definitions of the function keys should be discussed and demonstrated in departmental meetings and immediately reflected in the departmental function key list.

CHAPTER TWO
IMPORTANT KEYS FOR PROGRAMMING AND USING FUNCTION KEYS



KEYSTROKES AND FUNCTIONS

("+"=press the keys simultaneously; ","=press the key after other keystroke(s).
<F_> =selected function key.)

KEYSTROKE(S)	FUNCTION(S)
<Alt> + <Recrd>, <F_>	Start recording keystrokes on a selected function key
<Alt> + <Recrd>	1.Restart recording keystrokes after pausing for inputting variable information 2.Store all keystrokes on a function key.
<Pause>	Suspend recording of key strokes in order to input variable information.
<Reset>	Press <Reset> several times when recording a sequence going to another screen. (For details see Chapter Three)
<Delete>	To delete all the recorded sequence on a function key: <Alt>+<Record>, <F_>, <Delete>, <Alt>+<Record>.
<Play>, <F_>	Start automatic execution of the key sequence recorded on a selected function key.
<Play>	Restart the automatic execution of the rest of the key sequence after pausing to input variable information.
<Alt><Reset>	Stop the automatic execution of keystrokes.

CHAPTER THREE

PROCEDURES FOR PROGRAMMING AND USING THE FUNCTION KEYS

I. TO PROGRAM THE FUNCTION KEYS:

1. Write down all the keystrokes/steps you want to record on a function key by making notes or print-outs of screens contained in the entire sequence. Circle in red the cursor position you want to start recording (usaully the cursor position at the end of a sequence), pausing, restarting, etc. and the constant and variable information to be entered. A blank work sheet to record the entire program on a function key is included at the end of Chapter Four.

2. Start recording by pressing **<Alt> and <Recrd> simultaneously and then the selected function key.**

3. Input the keystrokes which will be executed automatically when the function key is played.

4. Press **<Pause>** prior to entering variable information and then type the variable information such as NOTIS no, OCLC no, etc.

5. Press **<Alt> and <Recrd>** to restart recording constant key sequence again.

6. Press **<Alt> and <Recrd>** to store the entire sequence on a function key. **Please note that the keystrokes recorded will be automatically executed in the SAME position on the screen when the function key is played regardless of circumstances** (e.g. when programming logging on to CUNYPLUS, back tabbing and then typing cunyplus at the request line is recommended instead of tabbing to the position of CUNYPLUS in order to avoid getting to the wrong position on the screen).

7. There are three alternatives in dealing with unpredictable system response time when programming a function key containing multiple screens. Staff preference

and experience with the definition and use of function keys will be important in determining which alternatives to choose. The advantages and disadvantages are as follows:

Method	Advantage(s)	Disadvantage(s)
Press <Reset> x times to allow sufficient time for retrieving the succeeding screen. Usually more resets are needed for screens with more information.	Most efficient when the system response is good since it allows non-stop execution of many steps.	1. Difficult to determine how many resets are needed each time. 2. Occasional problems caused by slow system response.
Press <Pause> <Alt> <Recrd> <Reset> after pressing <Enter>, <Clear>, etc. each time at the succeeding screen.	1.Eliminates problems caused by unpredictable system response time. 2.The pattern of use is consistent with different function keys, e.g. press <play> at the succeeding screen, therefore, easy for staff to remember.	Requires repeated pressing of <Play>, therefore renders the whole process less efficient.
Press <Pause> <Alt> <Recrd> <Reset> after <Enter>, <Clear>, etc. only at a problematic screen such as the CICS screen	Eliminates problems frequently occurring at a certain screen but still enables efficient processing.	The pattern of use differs from function key to function key, therefore, difficult for staff to remember.

NOTE: You do not need to press <Reset> for the succeeding screen if you are in pause.

8. Press **<Alt> and <Recrd> simultaneously, then the function key and <Delete>** to delete the entire sequence recorded on the function key. Press **<Alt>** and **<Recrd>** to complete the process.

9. A maximum of 4000 keystrokes can be recorded not counting the keystrokes you

9. A maximum of 4000 keystrokes can be recorded not counting the keystrokes you input after pressing **<Pause>**. The number of remaining keystrokes you can input appears at the bottom of the screen.

10. The following keys cannot be recorded: **<Print>, <SetUp>, <Recrd> and <Play>.**

11. Meaning of symbols at the bottom of the screen:

    R3876=You are in the process of recording. There are still 3876 keystrokes you may input.

    R = You are in Pause. You may input variable information on one or more screens.

    P+picture of function keys=You will start a recorded program after pressing a selected function key. You may define any blank function keys or delete definitions of those already defined as shown in black or intensified color.

    P=You are in the midst of playing a function key.

II. TO REPLAY THE KEY SEQUENCE RECORDED ON A FUNCTION KEY:

1. Press **<Play> and the selected function key.**

2. Input variable information as required.

3. Press **<Play> to restart** the automatic execution of the remaining sequence recorded on the function key.

4. Press **<Alt> and <Reset>** as many times as needed to exit the program when problem arises.

CHAPTER FOUR

EXAMPLES

The examples in this guide illustrate how complicated NOTIS work sequences can be efficiently executed by programming and using function keys. The applications of function key programming procedures are unlimited. We have found programmed function keys helpful for not only regular NOTIS acquisitions and cataloging routines but also time-consuming, large-scale database maintenance tasks. More examples will be provided in the future editions of this guide. The examples are provided on a work sheet specially designed to facilitate the recording of the definition and use of a selected function key. It is suggested that a notebook of completed work sheets be made available for staff for quick reference and for reprogramming the same functions with slight modifications. A blank work sheet is included at the end of this guide which can be xeroxed for recording the programs on your local function keys and their use.

The work sheet is organized as follows:

1. FUNCTION KEY: < >: fill in the number of the selected function key such as F1, F2, etc. on which the sequence is recorded.

2. SUMMARY OF FUNCTIONS TO BE PERFORMED: Fill in a summary of functions to be performed. Note specific limitations such as : For single volume, LC classified titles only.

3. SCREEN SEQUENCE: List the sequence of screens recorded on the function key.

4. SCREEN: The individual screen on which particular keystrokes are recorded.

5. CHANGE BETWEEN RECORD/PLAY AND PAUSE/TYPE: This is specially helpful for arriving at the procedures of how to use the function keys by simply substituting <Alt> <Recrd> with <Play> and <Pause> with Type variable information.

6. HOW TO DEFINE THE FUNCTION KEY: Fill in detailed steps/keystrokes recorded including the number of resets pressed and the exact position to start recording, pausing, restarting, etc.

7. HOW TO USE THE FUNCTION KEY: Fill in the detailed procedures for using the function key including the beginning and ending cursor position.

NOTE: The attached examples are based on our local procedures. You might want to modify the procedures according to your local workflow and determine the number of resets to be used according to your average local system response time.

WORK SHEET FOR PROGRAMMING AND USING A FUNCTION KEY
FUNCTION KEY :< F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Sign on to CUNYPLUS or NOTISTRN. (It is better to define two different function keys to sign on to each mode).

S.S=Screen sequence; Screen=The screen or record in which information is entered
Rc=Record; Pl=Play; Pa=Pause; Tv=Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	VTAM	Rc/Pl+ <F >	1. Press <Alt><Recrd>, <F > and Back Tab key to move cursor to the bottom of screen after---> and type cunyplus (or notistrn) and press <Enter> followed by 18-22 resets. You may also press <Enter> <Pause> to go to CICS screen and then restart recording. This will require pressing <Play> at CICS screen.	1. Press<Play><F_>.
2	CICS		2. Press <Clear> followed by 10-14 resets.	
3	blank		3.Type cssn. Press <Enter> followed by 12-16 resets.	
4	Sign on Screen	Pa/Tv	4. Press <Pause> and input your user ID and password. Press <Enter>. For security reasons ID and password should not be recorded for a shared terminal.	2. Input ID and password. Press <Enter>.
5	screen showing "sign-on is complete"	Rc/Pl	5. At home position press <Alt><Recrd> and type ltqc fi. Press the space bar once and <Alt><Recrd> to store.	3. Press <Play> to display ltqc fi.

WORK SHEET FOR DEFINING AND USING A FUNCTION KEY

FUNCTION KEY: < F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Log off CUNYPLUS.

S.S. = Screen sequence; Screen = The screen or record in which information is entered
Rc = Record; Pl = Play; Pa = Pause; Tv = Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	any screen	Rc/Pl	1. Press <Alt><Recrd> and <F >. 2. Press <Clear> followed by 3-4 resets.	1. Press <Play> and <F >.
2	succeeding screen		3. Press <Clear> followed by 3-4 resets.	
3	blank screen		4. Type cssf logoff. Press <Enter> and 18 resets.	

WORK SHEET FOR PROGRAMMING AND USING A FUNCTION KEY

FUNCTION KEY : <F_>

SUMMARY OF FUNCTION TO BE PERFORMED: Retrieve copy holdings record, update cataloging status to h, classification code to L,input cataloger's initials, create item record. **(Note: to be used for single volume, LC classified and circulating titles from step 1-7. For reference titles, discontinue the program after step 5.)**
S.S. =Screen sequence; Screen=The screen or record in which information is entered.

S.S.	Screen	Change bet. Rc/Pl and Pa/Tv	How to define the function key	How to use the function key
1	blank screen or last screen in the sequence	Rc/Pl + <F_> Pa/Tv	1. At home position, type ltqc find and press the space bar. Press <Alt><Recrd> and <F_>. Type no and press space bar once. 2. Press <Pause>. Type OCLC no.... and retrieve the copy holdings record.	1. At one space after ltqc find press <Play> and <F_> 2. Type 8 digit OCLC no. and retrieve the copy/holdings record.
2	copy holdings record	Rc/Pl Pa/Tv Rc/Pl	3. At home position press <Alt><Recrd>. Change to 1L after 001. Move cursor after notes and type c:. 4. Press <Pause>. Type cataloger's initials. Review and make modifications if needed. 5. When completed press <Enter><Enter>. 6. At home position press <Alt><Recrd> and type citm 1 and press <Enter>.	3.At home position press <Play>. 4. Type cataloger's initials after c: Make modifications. 5. When completed press <Enter><Enter>. **<u>For reference titles, discontinue here by pressing <Alt><Reset> several times to exit the program. Type find, press space bar,then restart from step 1.</u> 6.At home position press <Play>.
3	item record		7. Press <Reset> 18-20 times. 8. Tab down to item ID 9. Press <Alt><Record>.	7. Wand in or type the barcode no. after ITEM ID and press Enter. When the screen displays: LTQC FIND APVxxxx-x-x, etc. you may restart 1 space after ltqc find.

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WORK SHEET FOR PROGRAMMING AND USING A FUNCTION KEY
FUNCTION KEY :< F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Update copy holdings record for the Leisure Reading titles which need to be transferred after one year to the main stacks (e. g.change Status to h, add an action date for the same date next year, add cataloger's initials, add lei after qcmn in location and create item record). This program may be adapted for change of location from Reference to Circulation by modifying step 3 (e.g. change location from qcrf to qcmn). You can also modify this program for any frequent or large scale location changes. Stop after step 4 when no item record needs to be created.

S. =Screen sequence; Screen=The screen or record in which information is entered
Rc=Record; Pl=Play; Pa=Pause; Tv=Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	blank screen or the last screen in the sequence	Rc/Pl + <F_> Pa/Tv	1. Type ltqc find and press space bar once. Press <Alt><Recrd> and < F_>. Type no and press space bar once. 2. Press <Pause> and type OCLC no. Press Enter. Retrieve copy holdings record.	1.At one space after ltqc find press <Play><F_>. 2. After no type OCLC no. Press Enter. Retrieve copy holdings record. Check accuracy of the record, make needed modifications.
2	copy holdings record	Rc/Pl	3. At home position press <Alt><Recrd>. Make changes as follows: a. Change status to h. b. Add an action date c. Type c: and initials after note. d. Change to 1L after 001. e. Add,lei after qcmn. 4.Press <Enter> and 8 resets. Press <Enter> and 15 resets. 5. At home position type citm 1. Press <Enter> and 18 Resets.	3. At home position press <Play>.
3	item record		6. Tab cursor to ITEM ID and press <Alt><Recrd>.	4. Wand in the barcode no.

WORK SHEET FOR DEFINING AND USING A FUNCTION KEY

FUNCTION KEY: < F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Create new fund record.

S.S. = Screen sequence; Screen = The screen or record in which information is entered
Rc = Record; Pl = Play; Pa = Pause; Tv = Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	blank screen or the last scree n in the sequence	Rc/Pl + <F > Pa/Tv	1. On blank screen type ltqc find followed by 1 space. Press <Alt><Recrd>, <F >, back to 1 space after ltqc and type cfnd. 2. Press <Pause>, type fund code press <Enter>.	1. At 1 space after ltqc find press <Play> and <F>. 2. Type fund code, press <Enter>.
2	fund record	Rc/Pl	2. Input FUND NAME, GP, OFFICIAL ID and tab to FY field. 3. Press <Alt><Recrd>. Type 91/92 07/01/91 - 06/30/92 and press <Alt><Recrd>.	3. Input FUND NAME, GP, OFFICIAL ID and tab to FY. 4. Press <Play> 5. Input net allocation, etc. to review the record and make changes. Press <Enter>,<Enter>.

WORK SHEET FOR DEFINING AND USING A FUNCTION KEY

FUNCTION KEY: < F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Create new fiscal year fund record.

S.S. = Screen sequence; Screen = The screen or record in which information is entered
Rc = Record; Pl = Play; Pa = Pause; Tv = Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	blank screen or the last screen in the sequence	Re/Pl + <F > Pa/Tv	1. At blank screen type ltqc find followed by 1 space. Press <Alt><Recrd>,<F >. Type fc after find and press the space bar. 2. Press <Pause> and input the fund code, press <Enter>.	1. After ltqc find press <Play> and <F >. 2. Type fund code, press <Enter>
2	fund record	Rc/Pl	3. Press <Alt><Recrd>, after LTQC type nfnd 91/92 and press <Enter>, 12 resets. Tab to FY and type 07/01/91-06/30/92, tab to ALLOCATION and press <Alt><Recrd>.	3. Press <Play>. 4. Input initial allocation, review the record and press <Enter>, <Enter>.

WORK SHEET FOR DEFINING AND USING A FUNCTION KEY

FUNCTION KEY: < F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Activate new fiscal year fund record and deactivate previous fiscal year records. This procedure is especially efficient for maintaining a large number of fund records.
(** You may combine creating and activating the new fiscal year fund record on one function key if new fund records can be activated at the same time when they are created.)

S.S. = Screen sequence; Screen = The screen or record in which information is entered
Rc = Record; Pl = Play; Pa = Pause; Tv = Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	blank screen or the last screen of the sequence	Rc/Pl Pa.Tv	1. On blank screen type ltqc find and press the space bar once. Press <Alt><recrd> and <F > type fc followed by 1 space. 2. Press <Pause>. Type fund code and press <Enter>.	1. At one space after LTQC FIND press <Play> and <F >. 2. Type fund code and press <Enter>.
2	Previous FY fund record	Rc/Pl	3. Press <Alt><recrd> and at 1 space after ltqc type year 91/92 (new FY), tab after STATUS and change A to I, press <Enter>, 16 resets.	3. Press <Play>
3	new FY fund record		4. Tab after STATUS and change I to A, press <Enter>, 10 resets, <Enter>, 8 resets, <Alt><recrd>.	

WORK SHEET FOR PROGRAMMING AND USING A FUNCTION KEY
FUNCTION KEY :< F__>

SUMMARY OF FUNCTION(S) TO BE PERFORMED: Order rush reserve books from Ambassador--our library's main book jobber (For single volume, new titles only)

S.S. =Screen sequence; Screen=The screen or record in which information is entered
Rc=Record; Pl=Play; Pa=Pause; Tv=Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	blank screen or the last screen in the sequence	Rc/Pl + <F__>	1. On blank screen type ltqc hldg and press the space bar. Press <Alt><Recrd>,<F >, back to one space after ltqc and type fi no followed by 1 space.	1. Press <Play><F__> 1 space after ltqc hldg.
		Pa/Tv	2. Press <Pause> and then type OCLC no. Press <Enter>... and retrieve the copy holdings record.	2. Type OCLC no. Press <Enter>... and retrieve the copy holdings record.
2	copy holdings record	Rc/Pl	3. Press <Alt><Recrd> at home position and type crod 1. Press <Enter> followed by 18 resets.	3. Check the copy holdings record and make needed modifications. Press <Play> at home position.
3	O/P/R		4. Input constant information: VENDOR: AMBASS ACTINT:030 NV:RUSH! NO: For Reserve FC:QCRES54	
		Pa/Tv	5. Tab to AMT field, press <Pause> and input amount.	4. Type amount after AMT:.
		Rc/Pl	6. Press <Alt><Recrd> and back tab to NO: field, bring cursor after Reserve. Press <Alt><Recrd>.	5. Press <Play>.
				6. Input Reserve course no., prof., etc. Press F12 to review, then <Enter>. Restart 1 space after ltqc hldg.

WORK SHEET FOR PROGRAMMING AND USING A FUNCTION KEY

FUNCTION KEY :< F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED: 1) Create invoice, 2) post payment in O/P/R, 3) change copy and class. status codes in copy holdings statement, 4) approve invoice.
(To be used for single title invoice, receipt of single volume reserve titles ordered from Ambassador only).
**You may also define 3 or 4 function keys for the above functions.

S.S. =Screen sequence; Screen=The screen or record in which information is entered
Rc=Record; Pl=Play; Pa=Pause; Tv=Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key
1	blank screen or the last screen in the sequence	Rc/Pl	1. On blank screen type ltqc find and press the space bar once. Press <Alt><Recrd>, <F_>. Back to 1 space after ltqc and type cinv and press <Enter> followed by 19 resets.	1. At 1 space after ltqc find press <Play><F_>.
2	invoice record	Pa/Tv Rc/Pl	2. Type AMBASS after VENDOR. Tab to INV NO and press <Pause>. Input INV NO, INV DT, INV AMT, etc. Review, make needed changes, and press <Enter> 3. Press <Alt><Recrd>. Type done at home position and press <Enter> followed by 8 resets.	2. Fill in INV NO,INV DT, INV AMT, etc. Review and press <Enter>. 3. Press <Play>.
3	screen showing "INVOICE UPDATED"	Pa/Tv	4. Type first 2 digits of NOTIS order no. 1a. 5. Press <Pause> and then input the rest of NOTIS no. and press <Enter>.	4.Type the rest of NOTIS no. and press <Enter>.
4	O/P/R	Rc/Pl Pa/Tv	6. At home position press <Alt><recrd> and type cstm p, press <Enter> and 10 resets. 7. Change AN to ZN, input XC:1000. 8. Press <Pause>, input AMT, press <Enter>.	5. Press <Play>. 6. Input Amount of payment and press <Enter>.
5	Screen showing "RECORD UPDATED"	Rc/Pl	9. Press <Alt><Recrd>, insert ho after ltqc and delete ND before NOTIS no., press <Enter>, 16 resets.	7. Press <Play>.
6	copy holdings record		10. Tab after 001 and change codes after 001 to 11, press <Enter>, 8 resets.	
7	Screen showing "... RECORD UPDATED"	Pa/Tv	11. Back to 1 space after ltqc and type fi inv c, press <ErEOF>, <Enter>,<Pause>.	
8	invoice record	Rc/Pl	12.Press <Alt><recrd>,<reset>, type aprv, press <Enter>, 8 resets. Press <Alt><Recrd>.	8. Review invoice, make changes when needed. 9. At home position press <Play>.

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WORK SHEET FOR DEFINING AND USING A FUNCTION KEY

FUNCTION KEY: < F_ >

SUMMARY OF FUNCTION(S) TO BE PERFORMED:

S.S. = Screen sequence; Screen = The screen or record in which information is entered
Rc = Record; Pl = Play; Pa = Pause; Tv = Type variable information

S.S.	Screen	Change bet. Rc/Pl & Pa/Tv	How to define the function key	How to use the function key